

**CITY OF NEWTON  
PURCHASING DEPARTMENT**

***CONTRACT FOR THE PLANNING DEPARTMENT***

**REQUEST FOR PROPOSAL:  
NEWTON ARCHITECTURAL SURVEY  
1870 TO 1915  
*RFP #17-44***

**Proposal Due Date: December 15, 2016 at 10:00 a.m.**

**DECEMBER 2016**

**Setti D. Warren, Mayor**

**CITY OF NEWTON**  
**PURCHASING DEPARTMENT**  
**REQUEST FOR PROPOSALS #17-44**

The City of Newton (City) invites sealed proposals from Consultants for:

**NEWTON ARCHITECTURAL SURVEY 1870 TO 1915**

Proposals will be received until: **10:00 a.m., Thursday, December 15, 2016**  
at the Purchasing Department, Room 201, Newton City Hall, 1000 Commonwealth Ave., Newton, MA 02459. Immediately following the deadline for proposals a list will be created of all proposers names received and will be posted to the City's website: [www.newtonma.gov/bids](http://www.newtonma.gov/bids).

Contract Documents will be available on line at [www.newtonma.gov/bids](http://www.newtonma.gov/bids) or for pickup at Newton City Hall, Room 201, Purchasing Department, 1000 Commonwealth Avenue, Newton Centre, MA 02459 after **10:00 a.m., December 1, 2016**.

There will be no charge for contract documents.

Award will be made to the most advantageous proposer for services.

The term of the contract **shall extend from the date of execution until September 22, 2017**.

All proposals are subject to the provisions of M.G.L. c.30B.

All proposals shall be submitted as follows: **(i) one (1) original, three (3) paper copies and a CD copy of the Technical Proposal and (ii) one (1) ORIGINAL COPY of the Price Proposal.**

All City bids are available on the City's web site at [www.newtonma.gov/bids](http://www.newtonma.gov/bids). It is the sole responsibility of the contractor downloading these bids to ensure they have received any and all addenda prior to the bid opening.

Addenda will be available online with the original bid document as separate files. If you download bids from the internet site and would like to make it known that your company has done so, you may fax the Purchasing Department (617) 796-1227 or email to [purchasing@newtonma.gov](mailto:purchasing@newtonma.gov) with your NAME, ADDRESS, PHONE, FAX AND INVITATION FOR BID NUMBER.

The City will reject any and all bids in accordance with the above referenced General Laws. In addition, the City reserves the right to waive minor informalities in any or all bids, or to reject any or all bids (in whole or in part) if it be in the public interest to do so.

In the event that any person wishes to attend a bid opening or pre-bid meeting, accessible and reasonable accommodations will be provided to persons requiring assistance. If you need a reasonable accommodation, please contact the city of Newton's ADA Coordinator, Jini Fairley, at least two business days in advance of the meeting: [jfairley@newtonma.gov](mailto:jfairley@newtonma.gov) or (617) 796-1253. For Telecommunications Relay Service, please dial 711.

CITY OF NEWTON



Nicholas Read  
*Chief Procurement Officer*  
December 1, 2016

**CITY OF NEWTON, MASSACHUSETTS  
PURCHASING DEPARTMENT**

**December 1, 2016**

**REQUEST FOR PROPOSAL #17-44**

**NEWTON ARCHITECTURAL SURVEY 1870 TO 1915**

**I. DECISION TO USE COMPETITIVE SEALED PROPOSALS**

The *Chief Procurement Officer* has determined that in order to select the most advantageous proposal for historic preservation services for the City of Newton Planning and Development Department, comparative judgments of technical factors and not price alone will be necessary. The City believes that the individual(s)/firm serving in this capacity must have a broad range of experience with History, Architectural History, and Historic Preservation.

**II. INSTRUCTIONS TO PROPOSERS**

- A. **GOVERNING LAW and DEADLINE FOR SUBMISSION:** All proposals must be submitted in accordance with Massachusetts General Laws Chapter 30B, Section 6, to the *Chief Procurement Officer* in the Purchasing Department, Newton City Hall, 1000 Commonwealth Avenue, Newton, MA 02459, **no later than 10:00 a.m., Thursday, December 15, 2016.**

Bidders shall submit **one original, three (3) copies and ONE (1) CD** of the technical proposal in one envelope and **one (1) Price Proposal** in a separate sealed envelope. Please ensure that **“Technical” & “Price” Proposals are submitted in separate sealed envelopes.**

Envelopes shall be marked:

1. **“TECHNICAL PROPOSAL - RFP #17-44 – Newton Architectural Survey 1870 to 1915”**

**Proposals must have information submitted in the same order of the criteria as listed in this RFP and pages shall be numbered in the bottom footer. Proposals must have a Table of Contents listing the page number providing documentation that demonstrates they have met each of the criteria listed.**

2. **“PRICE PROPOSAL – RFP #17-44 - Newton Architectural Survey 1870 to 1915”**

**IF PRICE IS INCLUDED IN THE TECHNICAL PROPOSAL, THE PROPOSAL MAY BE DISQUALIFIED.**

**Faxed proposals will not be accepted.**

If you wish to receive notification of bids, please email us your company information to [purchasing@newtonma.gov](mailto:purchasing@newtonma.gov) , otherwise you may view all City of Newton public bids online at [www.newtonma.gov/bids](http://www.newtonma.gov/bids) .

- B. **QUESTIONS/ADDENDUMS:** Inquiries involving procedural or technical matters should be directed in writing, no later than **Thursday, December 8, 2016 at 12:00 noon** to:

[purchasing@newtonma.gov](mailto:purchasing@newtonma.gov) or facsimile (617) 796-1227  
Purchasing Department  
City of Newton  
1000 Commonwealth Avenue  
Newton, MA 02459

ADDENDA: Each proposer is required to acknowledge any/all Addenda. Proposers shall place their acknowledgment as the first line of their Transmittal/Cover Page which shall be placed as the first page of the “Technical Proposal” as well as in the designated line of the “Price Proposal”.

Addenda will be posted online and emailed to every individual or firm on record as having received a set of Contract Documents. If you have downloaded the Request for Proposal from the internet, you must make your company known to the City of Newton, Purchasing Department by emailing or faxing your company’s: name, address, phone, fax, and email address and include the RFP NUMBER (#17-44) and project title. It is the contractor’s sole responsibility to ensure that they have received all addenda’s prior to the RFP submittal date. Copies of addenda will be made available at the Purchasing Department and on the City’s website: [www.newtonma.gov/bids](http://www.newtonma.gov/bids)

If you have downloaded the RFP please be sure to email us ([purchasing@newtonma.gov](mailto:purchasing@newtonma.gov)), your Name, Address, Phone and Fax numbers, email address and what RFP number and project title you have downloaded.

- C. EXAMINATION OF DOCUMENTS: Each proposer shall be satisfied, by personal examination of the location of the contemplated services and by any other means, as to the requirements of the contemplated services to enable the intelligent preparation of this proposal. The proposer shall be familiar with all RFP Documents before submitting the proposals in order that no misunderstanding shall exist in regard to the nature and character of the contemplated services to be performed. No allowance will be made for any claim that the proposal is based on incomplete information as to the nature and character of the area or contemplated service.
- D. The City of Newton will reject any and all bids when required to do so by the above referenced General Laws. In addition, the City of Newton reserves the right to waive any informalities in any or all bids, or to reject any or all bids in whole or in part, if it be in the public interest to do so.
- E. TIMELINE:

<b>RFP Released:</b>	<b>December 1, 2016 @ 10:00 a.m.</b>
<b>Questions submitted:</b>	<b>December 8, 2016 @ 12:00 noon</b>
<b>Addenda w/Answers:</b>	<b>December 13, 2016 @ 12:00 noon</b>
<b>Proposal Submittal:</b>	<b>December 15, 2016 @ 10:00 a.m.</b>
<b>Award:</b>	<b>TBA</b>

### III. EVALUATION OF PROPOSALS

There will be no public opening of submitted proposals. Following the deadline for receipt, the *Chief Procurement Officer* will open the Technical Proposals and prepare a register of those firms submitting proposals which shall be available for public inspection. All proposal contents shall be confidential until the evaluation is final and award has been made.

The Technical proposals shall be evaluated by individuals within the City of Newton requesting department designated by the *Chief Procurement Officer* who shall prepare their evaluation based on the criteria contained herein.

Upon completion of the technical evaluation, the *Chief Procurement Officer* will open and evaluate the Price Proposals. A contract will be awarded to the responsive and responsible proposer whose proposal is determined to be most advantageous taking into consideration cost and evaluative criteria. The City reserves the right to reject any and all proposals and to award a contract as determined to be in the best interests of the City.

All proposals shall remain firm for sixty (60) calendar days after the proposal opening.

**City of Newton**  
**Newton Historical Commission**  
**Newton Architectural Survey 1870 to 1915**

**NARRATIVE STATEMENT**

The City of Newton Planning and Development Department provides staff assistance and preservation expertise to the Newton Historical Commission, local historic district commissions, and the community. Preservation staff members of the Planning and Development Department have completed inventory forms, National Register nominations, and a variety of other preservation projects. Over the past several years, increasing development pressure on historic buildings in the City of Newton has revealed gaps in the existing survey information for vulnerable historic properties and neighborhoods.

In FY10 with the assistance of a Massachusetts Historical Commission (MHC) Survey and Planning grant, the City of Newton completed an intensive level survey of the oldest architectural resources in the City, dating up through the Federal Period (c.1830). Starting in FY12, the City of Newton, with the assistance of an MHC Survey and Planning grant contracted with preservation consultant firm Larson Fisher Associates, to continue this work. In FY12, the City began documenting buildings from the next major period of architectural development, the Early Industrial Period (1830-1870). Given the number of potential targets, surveying buildings from the Early Industrial Period was broken up into three phases which were funded with MHC Survey and Planning grants. 150 buildings dating from 1831-1850 were surveyed in Phase I. Phase II documented an additional 100 properties dating from 1830 to 1870, and 125 properties were surveyed in Phase III.

Our goal for the proposed FY16 project is to produce approximately 100 inventory forms for properties dating from 1870 to 1915 which have not been previously surveyed. The focus would be on neighborhoods and areas that appear to be vulnerable to inappropriate development and demolition. In recent years, the lack of available buildable land in Newton has threatened older cultural resources with demolition and the requests for demolition review of historic properties have continued to increase for most of the villages in Newton. A review of properties which have come before the Newton Historical Commission in 2015 showed that most of the properties were more modest or simple buildings which had not been previously surveyed. Many of the properties fell within the proposed survey date range of 1870 to 1915 and were also located in areas with similar properties that also had not been surveyed. Based on a review of several such areas, we have a preliminary list of properties that potentially could be surveyed (Appendix A) and expect to have a more developed list of over 100 potential properties available at the start of the project.

As with our previous survey projects, we plan to make the survey information available to city staff and the public. Although the level of existing information about cultural resources in the City of Newton is comparatively high, we have found that there are gaps, particularly for more modest properties. The sheer number of architectural surveys completed in Newton over the years show that Newton has an extraordinary collection of cultural resources. The City of Newton has recognized this fact, and has devoted significant municipal resources to planning for and preserving historic properties in Newton. It is our intention to use this survey to better protect these vulnerable resources by expanding the public's understanding of Newton's historic properties; to further our program of public education, and enhance municipal coordination. We intend to share this information with city staff and the public through every technological means available to us. We will also identify and incorporate preservation strategies for the most vulnerable historic resources. This work will culminate in a list of properties and/or districts that will be recommended for nomination to the National Register of Historic Places, if not already listed.

## SCOPE OF WORK

### PROJECT OBJECTIVES

The purpose of this project will be to undertake an intensive level survey of historic, cultural and architectural resources in the City of Newton which have not been previously surveyed, dating from 1870 to approximately 1915. The focus would be on neighborhoods and areas that appear to be vulnerable to inappropriate development and demolition. This project will provide professional historic preservation survey expertise via a preservation consultant to the City of Newton, and is designed to build and expand upon previous efforts and existing survey information by documenting 100 properties. The Planning and Development Department has included a preliminary list of properties that potentially could be surveyed in Appendix A and intends to provide a more developed list at the start of the project of at least 150 properties that have not been surveyed, are in the areas under threat from demolition and were constructed in the target date range. The survey will maximize the use of technological data sharing in the City, using, for example, the municipal GIS and Assessor's Department online database. Specific project goals are as follows:

- 1) To conduct a communitywide survey to assess and document approximately 100 selected cultural and architectural resources dating from 1870 to approximately 1915, following Massachusetts Historical Commission (MHC) survey standards and methodology.
- 2) To identify contexts for National Register evaluation and to apply the National Register criteria to all resources identified in the survey;
- 3) To submit to MHC a list of individual properties and/or districts, which are recommended for nomination to the National Register of Historic Places.

As with earlier project phases, efforts will be concentrated on properties that have not been previously surveyed. Properties within the identified target date range located within local historic districts or that have other preservation protections placed on them will not be resurveyed. If research determines a property is outside of the target date range, the consultant will do the research necessary to confirm the later construction date and provide the corrected information for future survey updates and corrections to the City of Newton's Assessor's database. All qualified resources will be photographed and evaluated for National Register eligibility.

### METHODOLOGY

#### The Analytical Framework:

The community-wide survey project must incorporate MHC criteria and methodology, to current standards. (See MHC's *Historic Properties Survey Manual: Guidelines for the Identification of Historic and Archaeological Resources in Massachusetts* (1992), *Survey Technical Bulletin #1* (1993), *MHC Interim Survey Guidelines* (March 1999, et seq.), *MHC Interim Guidelines for Inventory Form Photographs* (2009), and MHC's *Interim Guidelines for Inventory Form Locational Information* (2015). Both MHC survey guidelines and the tasks and products of the survey Scope of Work meet the Secretary of the Interior's *Standards and Guidelines for Identification* (1983).

The MHC criteria for conducting a community-wide survey are designed to identify the full range of cultural resources. Cultural resources are the physical elements in the landscape that remain from historical patterns of human activity. There are many components of a community's historical development that are associated with the location and type of surviving cultural resources. A community-wide survey should therefore relate cultural resources to historic patterns of architectural development, land use, economic development, social and demographic history, and events that had an impact on the community. The community-wide survey should recognize ethnic and cultural diversity within the community, and seek to identify cultural resources associated with the history of the minority social and cultural groups and individuals that may have played a role in the community's history.

The *MHC Reconnaissance Survey Town Report* for the town and the corresponding MHC Reconnaissance Survey Regional Report, existing survey forms and National Register nominations on file with the MHC will provide a preliminary framework and base of information for this analysis. Individual forms and area forms will expand upon the information in the *Town Report* and will relate inventoried properties to the significant themes in the historical development of the town.

### Phase Meetings:

The project consists of four phases. Project personnel, consisting of City of Newton preservation staff and a preservation consultant(s), will meet with MHC staff at MHC offices in Boston to review project progress and products at the end of each phase. Work to be carried out during each phase and products due at the end of each phase, are described below.

### The Inventory:

A qualified, outside consultant will complete the inventory. The communitywide survey will consider the full range of cultural resources in terms of period, theme, property type, architectural form and style, and geographic distribution. The survey will consider architectural and historic development from the end of the Early Industrial Period c.1870 through the Late Industrial period, c.1915. Significant themes of historical and architectural development will be identified, and resources will be related to these themes.

The community survey will identify buildings and structures that are architecturally and historically significant in the history and development of the community during the late 19<sup>th</sup> century and early 20<sup>th</sup> century. The survey will include both representative and outstanding examples of the building forms, types, and styles present in the City of Newton.

MHC individual property and area inventory forms, maps and National Register recommendations will be completed and submitted to MHC in accordance with the survey guidelines set forth in the MHC's *Historic Properties Survey Manual: Guidelines for the Identification of Historic and Archaeological Resources in Massachusetts* (1992) and *Survey Technical Bulletin #1* (1993), MHC *Interim Survey Guidelines* (March 1999 et seq.), and MHC *Interim Guidelines for Inventory Form Photographs* (2009), MHC *Interim Guidelines for Inventory Form Locational Information* (2016), as well as the Secretary of the Interior's Standards and Guidelines for Identification (1983, copies available from the MHC). These publications and memoranda are all incorporated into this contract by reference. The work to be carried out during each phase, and products due at the end of each phase, are described on the following pages.

## **SCOPE OF WORK**

### **Phase I (4 weeks)**

#### Tasks:

- Meet with MHC staff to review the list of properties and to discuss the scope and inventory methodology of the project and to assess the available documentary materials (Newton History Museum and city archive files, collections and existing research, maps, local histories, etc.);
- Select maps, including a working map and large-scale assessor's base map, to identify inventoried areas and properties;
- Confirm availability of electronic mapping and parcel data and of city-based GIS data suitable for use in the project;
- Review existing inventory forms on file at the Newton History Museum and at the MHC;
- Conduct initial research and reconnaissance survey to verify the condition of the selected properties to be extensively researched in the survey.

#### Products:

- Working maps and large scale base map(s) to be used to identify inventoried properties
- Methodology statement, specifying:
  1. Survey objectives;
  2. Criteria for selecting properties for survey;
  3. Procedures to be followed in the survey and forms of products to be created;
  4. Expectations about the kind, location, and character of historic properties to be recorded;
  5. An assessment of existing documentation;
  6. A brief description of the amount and kinds of information to be gathered about the properties;
  7. Bibliography.

**Phase I will be completed by Friday, February 10, 2017**



## ***Phase II (6 weeks)***

### **Tasks:**

- Conduct continued architectural assessments and documentary research to identify important historic themes, events, and persons for the survey target areas, with particular attention to substantially synthesizing and supplementing the information already available. Research collections will include relevant local, regional and state library and archive collections as well as web-based research sites;
- Apply selection criteria and prepare list of specific properties to be surveyed;
- Complete representative draft inventory forms for different property types;
- Meet with NHC and MHC staff to review property lists and draft forms.

### **Products:**

- Excel spreadsheet of properties to be surveyed, arranged alphabetically by street address
- Representative draft inventory forms, to be submitted in both hard copy and MS Word format.

**Phase II will be completed by Friday, March 24, 2017**

## ***Phase III (20 weeks)***

### **Tasks:**

- Conduct intensive research of properties selected for inventory;
- Identify contexts for National Register evaluation and apply National Register criteria to inventoried areas and resources;
- Prepare draft list of all areas and resources recommended for National Register nomination;
- Prepare inventory forms with photographs and property location maps. Forms for any surveyed properties listed in the State Register of Historic Places must be marked at top front with appropriate designation code and date;
- Submit draft inventory forms with photographs, draft National Register contexts, and National Register recommendation to MHC and NHC for review and comment (comments to be incorporated during Phase IV);
- In consultation with NHC, MHC survey and MACRIS staff, develop lettering and numbering system for inventoried properties.

### **Products:**

- Unnumbered complete draft inventory forms for approximately 100 properties with photos and sketch maps for all areas, buildings, sites, structures, and parks/landscapes. (This information may optionally be submitted in electronic form only for this project phase [CD or DVD].)
- Draft discussion of National Register contexts and list of all areas and resources recommended for National Register nomination

**Phase III will be complete by Friday, August 11, 2017**

## ***Phase IV (6 weeks)***

### **Tasks:**

- Add inventory letters/numbers to forms, if these were not added in Phase III;
- Name MS Word files to conform to MHC file-naming convention;
- Complete National Register Criteria Statement forms to be attached to appropriate inventory forms;
- Prepare base map(s) identifying inventoried properties;
- Prepare street index of inventoried areas and properties.

### **Products:**

- Hard-copy numbered MHC inventory forms for approximately 100 properties (two sets with original photographic prints: one for MHC and one for the NHC). Inventory forms will be printed on 24 lb. bond paper of at least 25% cotton fiber content. Photographs will be 3½" X 5½" or 4" by 6" digitally produced ink jet prints using MHC approved printer/paper/ink combinations that produce prints with a minimum 75-year permanence rating. (The paper inventory forms may incorporate the electronic version photograph in addition to the attached photographic print.)
- Large-scale base map(s) with all inventoried areas and properties identified by inventory number (two sets: one for MHC and one for the NHC).



- Survey Final Report (four *paginated, unbound* copies (two for MHC, two for NHC) which will include the following sections:
  1. Abstract;
  2. Methodology statement, including survey objectives, assessment of previous research, selection criteria, procedures followed in the survey, description of products and accomplishments and an explanation of how results of survey differed from those expectations;
  3. Street index of inventoried properties. Areas will be listed separately at the beginning, arranged alphabetically by area name. Individually inventoried properties follow, arranged alphabetically by street name. Property name (if any) and inventory number also will be included on this list;
  4. Final discussion of National Register contexts and list of recommendations for areas and properties to be nominated to the National Register of Historic Places;
  5. List of revised construction dates for use by Assessor's Department;
  6. Further study recommendations; and
  7. Bibliography.
- CD containing a MS Word file for each inventory form. Each Word file will conform to MHC file naming convention, and incorporate photograph(s) and map(s). The CD will also include an MS Word version of the final survey report.
- A separate CD containing high-resolution TIF or JPG images for surveyed properties, identified by street address or MACRIS number, following MHC file naming convention for photographic images.

\*\*The Survey Final Report will identify the community repository and/or municipal office(s) where completed survey documentation (inventory forms, base maps and final report) will be made available to the public.

**Phase IV will be completed and submitted to the MHC and NHC by Friday, September 22, 2017**

**END OF SECTION**

**Minimum Criteria - provide documentation demonstrating your compliance with each criteria or reference what page number within your technical proposal this documentation can be found.**

Any proposer submitting a proposal must satisfy the following minimum criteria. Proposals which do not demonstrate compliance with the minimum criteria may not be further considered.

1. Proposers must meet the following minimum qualifications: a Bachelor's degree in Historic Preservation, Architectural History, History, Art History, or a closely related field, plus at least two years full time experience in an area relevant to the project; or a Master's degree in any of the above mentioned areas.
2. Resumes are required for all project personnel.
3. Completed Evaluation Criteria Comparison Form.
4. Completed Bidder's Qualifications and References Form, 2 pages
5. Completed Certificate of Tax Compliance Form, 1 page
6. Completed Certificate of Non-Collusion Form, 1 page
7. Completed Debarment Letter, 1 page
8. Completed IRS W-8 Form, 1 page

**Comparative Evaluation Criteria - provide documentation demonstrating your compliance with each criteria or reference what page number within your technical proposal this documentation can be found. These criteria are listed in order of priority.**

**1. Quality and Depth of Project Experience:**

**Highly advantageous:** The project proposal demonstrates superior experience in providing services related to the City's requirements. The project proposal demonstrates a wide depth of experience with similar projects (5 or more), and prior experience with municipally, privately, or MHC-funded not-to-exceed or fixed-fee contracts. Project work samples are of outstanding quality in content and technical presentation.

**Advantageous:** The project proposal demonstrates solid experience in providing services related to the City's requirements. The project proposal demonstrates a good depth of experience with similar projects (3 to 5), and prior experience with municipally or privately funded not-to-exceed or fixed-fee contracts. Project work samples are of good quality in content and technical presentation.

**Not Advantageous:** The proposer has limited experience in providing services related to the City's requirements or with similar projects (less than 3), and prior experience with public or private, not-to-exceed or fixed fee contracts. Project work samples minimally meet current standards for content and technical presentation.

**Unresponsive:** Has not completed any design guidelines or projects similar in scope.

**2. Qualifications of the Proposer:**

**Highly advantageous:** The proposer's resume(s) demonstrate that proposer has superior training, educational background and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience well beyond the minimum requirements.

**Advantageous:** The proposer's resume(s) demonstrate that proposer has adequate training, educational background and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience that meets or somewhat exceeds the minimum requirements.

**Not Advantageous:** The proposer's resume(s) does not demonstrate that proposer has adequate training, educational background and work experience appropriate to the project described herein.

**Unresponsive:** The proposer did not provide any resumes or background information for project personnel.

### 3. Completeness and Quality of Proposal:

**Highly advantageous:** Response is complete, concise, informative, and highly detailed. Proposal reflects that proposer is able to perform in a superior manner acceptable to the City. Evaluation team is completely convinced about the proposer's ability to provide the level of services as required by the City. Proposal demonstrates excellent communication and documentation skills.

**Advantageous:** Response is complete, informative, and meets criteria for responsiveness. Evaluation team finds proposal reflects that proposer is able to perform in an adequate manner acceptable to the City. Proposal demonstrates a good level of communication and documentation skills.

**Not Advantageous:** Response lacks a comprehensive approach, but meets criteria for responsiveness. Evaluation team finds proposal reflects that proposer may be able to perform in a manner acceptable to the City. Communication and documentation skills appear only adequate.

**Unresponsive:** Proposal lacks project information regarding the proposers approach to the project.

### 4. References (3)

One member of the Evaluation Committee will check three (3) references of all Consultant teams who meet the minimum criteria asking the same questions of each reference. The person who checks the references will prepare a report for the remaining evaluators.

**Highly advantageous:** All references contacted spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.

**Advantageous:** The great majority of references spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.

**Not Advantageous:** One reference stated that there had been significant difficulties with the proposer's ability to deliver the contracted services and deliverables.

**Unresponsive:** Proposal lacks references.

*The selection process will include an evaluation procedure based on the criteria identified below. Finalists will be required to appear for an interview.*

### Project Fee

The City of Newton has established a budget not to exceed \$25,000 for the Scope of Work described herein. Project fees must be provided for each of the four phases of work as described. Fees shown shall include all costs and expenses (including materials, copying, mileage, photography, etc.) necessary to complete the scope of work.

### Price Proposal

Proposers shall use "**ATTACHMENT A**" to this RFP #17-44 in submitting this price proposal. Please remember to submit your price proposal in a **spatially sealed marked envelope**. Any Technical proposal with prices will be deemed unresponsive.

### Contract Term:

Work under this RFP is expected to begin **the day of contract execution and shall extend for 10 months**.

**END OF SECTION**

## ATTACHMENT A – PRICE PROPOSAL

### City of Newton Planning Department

#### RFP #17-44 Newton Architectural Survey 1870 to 1915

This form must be completed and placed, within your price proposal and ensure your envelope is marked:

#### “RFP #17-44 Price Proposal- Newton Architectural Survey 1870 to 1915”

Name of Firm or individual submitting bid: \_\_\_\_\_  
(Please Print)

Contact Person \_\_\_\_\_

Address: \_\_\_\_\_

Telephone / FAX#: \_\_\_\_\_ / \_\_\_\_\_

E-mail address: \_\_\_\_\_

The proposer acknowledges the following addenda: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

PHASE #I \$ \_\_\_\_\_

PHASE #II \$ \_\_\_\_\_

PHASE #III \$ \_\_\_\_\_

PHASE #IV \$ \_\_\_\_\_

TOTAL COST \$ \_\_\_\_\_  
(not to exceed \$25,000)

## CITY OF NEWTON

## BIDDER'S QUALIFICATIONS AND REFERENCES FORM

All questions must be answered, and the data given must be clear and comprehensive. Please type or print legibly. If necessary, add additional sheet for starred items. This information will be utilized by the City of Newton for purposes of determining bidder responsiveness and responsibility with regard to the requirements and specifications of the Contract.

1. FIRM NAME: \_\_\_\_\_
2. WHEN ORGANIZED: \_\_\_\_\_
3. INCORPORATED? \_\_\_\_YES \_\_\_\_NO DATE AND STATE OF INCORPORATION: \_\_\_\_\_
4. IS YOUR BUSINESS A **MBE**? \_\_\_\_YES \_\_\_\_NO **WBE**? \_\_\_\_YES \_\_\_\_NO or **MWBE**? \_\_\_\_YES \_\_\_\_NO
- \* 5. LIST ALL CONTRACTS CURRENTLY ON HAND, SHOWING CONTRACT AMOUNT AND ANTICIPATED DATE OF COMPLETION:  
  
\_\_\_\_\_  
  
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- \* 6. LIST YOUR VEHICLES/EQUIPMENT AVAILABLE FOR THIS CONTRACT:  
  
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\_\_\_\_\_  
  
\_\_\_\_\_  
  
\_\_\_\_\_  
  
\_\_\_\_\_  
  
\_\_\_\_\_
- \* 7. IN THE SPACES FOLLOWING, PROVIDE INFORMATION REGARDING CONTRACTS COMPLETED BY YOUR FIRM SIMILAR IN NATURE TO THE PROJECT BEING BID. A MINIMUM OF FOUR (4) CONTRACTS SHALL BE LISTED. PUBLICLY BID CONTRACTS ARE PREFERRED, BUT NOT MANDATORY.  
  
PROJECT NAME: \_\_\_\_\_  
OWNER: \_\_\_\_\_  
CITY/STATE: \_\_\_\_\_

DOLLAR AMOUNT: \$ \_\_\_\_\_ DATE COMPLETED: \_\_\_\_\_  
PUBLICLY BID? \_\_\_\_\_ YES \_\_\_\_\_ NO  
TYPE OF WORK?: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_ TELEPHONE #: (\_\_\_\_) \_\_\_\_\_  
CONTACT PERSON'S RELATION TO PROJECT?: \_\_\_\_\_  
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: \_\_\_\_\_  
OWNER: \_\_\_\_\_  
CITY/STATE: \_\_\_\_\_  
DOLLAR AMOUNT: \$ \_\_\_\_\_ DATE COMPLETED: \_\_\_\_\_  
PUBLICLY BID? \_\_\_\_\_ YES \_\_\_\_\_ NO  
TYPE OF WORK?: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_ TELEPHONE #: (\_\_\_\_) \_\_\_\_\_  
CONTACT PERSON'S RELATION TO PROJECT?: \_\_\_\_\_  
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: \_\_\_\_\_  
OWNER: \_\_\_\_\_  
CITY/STATE: \_\_\_\_\_  
DOLLAR AMOUNT: \$ \_\_\_\_\_ DATE COMPLETED: \_\_\_\_\_  
PUBLICLY BID? \_\_\_\_\_ YES \_\_\_\_\_ NO  
TYPE OF WORK?: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_ TELEPHONE #: (\_\_\_\_) \_\_\_\_\_  
CONTACT PERSON'S RELATION TO PROJECT?: \_\_\_\_\_  
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: \_\_\_\_\_  
OWNER: \_\_\_\_\_  
CITY/STATE: \_\_\_\_\_  
DOLLAR AMOUNT: \$ \_\_\_\_\_ DATE COMPLETED: \_\_\_\_\_  
PUBLICLY BID? \_\_\_\_\_ YES \_\_\_\_\_ NO  
TYPE OF WORK?: \_\_\_\_\_  
CONTACT PERSON: \_\_\_\_\_ TELEPHONE #: (\_\_\_\_) \_\_\_\_\_  
CONTACT PERSON'S RELATION TO PROJECT?: \_\_\_\_\_  
(i.e., contract manager, purchasing agent, etc.)

10. The undersigned certifies that the information contained herein is complete and accurate and hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the City of Newton in verification of the recitals comprising this statement of Bidder's qualifications and experience.

DATE: \_\_\_\_\_ BIDDER: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_

**END OF SECTION**

## **CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee club, or other organization, entity, or group or individuals.

---

(Signature of individual)

---

Name of Business





**Request for Taxpayer  
Identification Number and Certification**

Give form to the  
requester. Do not  
send to the IRS.

Print or type  
See Specific instructions on page 2.

Name (as shown on your income tax return)	
Business name, if different from above	
Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ ..... <input checked="" type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
Address (number, street, and apt)	Requester's name and address (optional)
City, state, and ZIP code	
List account number(s) here (optional)	

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number
or

**Part II Certification**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶	Name
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**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Purpose of Form**

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

## **CONTRACT FORMS**

The awarded bidder will be required to complete and submit documents substantially similar in form to the following.

These forms may need to be modified on account of changed circumstances, and are provided for informational purposes only

**City - Contractor Agreement #C -**  
**Newton Architectural Survey 1870 to 1915**

This Agreement is entered into by and between

(hereinafter the "Contractor") and the City of Newton, a municipal corporation acting by and through its Planning Department but without personal liability to him (hereinafter the "City"); collectively, the "parties."

WHEREAS, the City needs the services of an Historic Preservation Professional; and

WHEREAS, the Contractor has submitted a responsive proposal for such services;

NOW THEREFORE, the parties agree as follows:

**1. Incorporation of Attached Documents**

The following documents, copies of which are attached hereto, are hereby incorporated as part of this Agreement:

-- City of Newton's Request for Proposal No. #17-44 , dated \_\_\_\_\_ issued by, *Chief Procurement Officer* (hereinafter "Request for Proposals");

--Technical and Price Proposal of \_\_\_\_\_, each dated \_\_\_\_\_, 2016 and signed by \_\_\_\_\_, (hereinafter, "Contractor's Proposal");

**2. Scope of Work**

Documentation of 100 properties built approximately between 1870 and 1915 to the Massachusetts Historical Commission's standards using inventory forms.

**3. Term of Agreement**

Work under this RFP is expected to begin the day of contract execution until September 22, 2017.

**4. Payment procedures**

The Contractor shall be paid as follows:

The City of Newton has established a fee not to exceed twenty-five thousand dollars (\$25,000.00) for the Scope of Work described herein. At the completion of each of the four project phases, the Contractor shall be paid a portion of the project cost after the submission of an invoice.

**5. Indemnification**

The Contractor acknowledges and agrees that he is responsible as an INDEPENDENT CONTRACTOR for all services provided under this Agreement and for all the acts of her employees and agents hereunder and agrees that she will indemnify and hold harmless the City and its agents and employees from and against all claims, damages, losses and

expenses, including attorney's fees arising out of, or resulting from, the performance of the services to be performed under this Agreement.

**6. Insurance**

The Contractor will provide the City with a certificate of insurance reflecting Comprehensive General Liability Insurance with a limit of liability of at least One Million Dollars (\$1,000,000.00) and evidence of workers compensation insurance covering employees of the Contractor. The Comprehensive General Liability policy must name the City as an additional insured and the certificate must reflect this status.

**7. Governing Law**

This Agreement shall be governed by and construed in accordance with the laws of the Commonwealth of Massachusetts.

**8. Non-assignability**

This Agreement and the duties of the Contractor to be performed hereunder or any payments due or accrued to the Contractor shall not be assigned or subcontracted.

**9. Entire Agreement**

This Agreement represents the entire understanding between the Contractor and the City. No change of any of the within terms and conditions can be made, except by written amendment(s) hereto and signed by both parties. This Agreement and any such amendments shall become binding on the City upon the execution thereof by the Mayor of Newton.

THIS SPACE INTENTIONALLY LEFT BLANK

IN WITNESS WHEREOF, the parties have set their hands and seals to this and two like originals.

**CONTRACTOR**

By \_\_\_\_\_

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

*Affix Corporate Seal here*

City funds are available in the following  
account numbers:

19B11414-5301 -

19C11404-5000 -

I further certify that the Mayor, or his designee,  
is authorized to execute contracts and approve  
change orders.

By \_\_\_\_\_

*Comptroller of Accounts*

Date \_\_\_\_\_

**CITY OF NEWTON**

By \_\_\_\_\_

*Chief Procurement Officer*

Date \_\_\_\_\_

By \_\_\_\_\_

*Director of Planning and Development*

Date \_\_\_\_\_

Approved as to Legal Form and Character

By \_\_\_\_\_

*Associate City Solicitor*

Date \_\_\_\_\_

**CONTRACT AND BONDS APPROVED**

By \_\_\_\_\_

*Mayor or his designee*

Date \_\_\_\_\_

## CERTIFICATE OF AUTHORITY - CORPORATE

1. I hereby certify that I am the Clerk/Secretary of \_\_\_\_\_  
(insert full name of Corporation)
2. corporation, and that \_\_\_\_\_  
(insert the name of officer who signed the **contract and bonds.**)
3. is the duly elected \_\_\_\_\_  
(insert the title of the officer in line 2)
4. of said corporation, and that on \_\_\_\_\_  
(insert a date that is ***ON OR BEFORE*** the date the officer signed the **contract and bonds.**)

at a duly authorized meeting of the Board of Directors of said corporation, at which all the directors were present or waived notice, it was voted that

5. \_\_\_\_\_ the \_\_\_\_\_  
(insert **name** from line 2) (insert **title** from line 3)

of this corporation be and hereby is authorized to execute contracts and bonds in the name and on behalf of said corporation, and affix its Corporate Seal thereto, and such execution of any contract of obligation in this corporation's name and on its behalf, with or without the Corporate Seal, shall be valid and binding upon this corporation; and that the above vote has not been amended or rescinded and remains in full force and effect as of the date set forth below.

6. ATTEST: \_\_\_\_\_ *AFFIX CORPORATE*  
(Signature of **Clerk or Secretary**)\* *SEAL HERE*
7. Name: \_\_\_\_\_  
(Please print or type name in line 6)\*
8. Date: \_\_\_\_\_  
(insert a date that is ***ON OR AFTER*** the date the officer signed the **contract and bonds.**)

\* The name and signature inserted in lines 6 & 7 **must** be that of the **Clerk or Secretary** of the corporation.



## CERTIFICATION OF TAX COMPLIANCE

Pursuant to M.G.L. c.62C, §49A and requirements of the City, the undersigned acting on behalf of the Contractor certifies under the penalties of perjury that the Contractor is in compliance with all laws of the Commonwealth relating to taxes including payment of all local taxes, fees, assessments, betterments and any other local or municipal charges (unless the Contractor has a pending abatement application or has entered into a payment agreement with the entity to which such charges were owed), reporting of employees and contractors, and withholding and remitting child support.\*

\_\_\_\_\_  
\*\*Signature of Individual (Mandatory)

\_\_\_\_\_  
\*\*\* Contractor's Social Security Number  
(Voluntary) or Federal Identification Number

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

**OR**

\_\_\_\_\_  
Company Name  
(Corporation, Partnership, LLC, etc.)

By: \_\_\_\_\_  
\*\*Corporate Officer (Mandatory)

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

\* The provision in this Certification relating to child support applies only when the Contractor is an individual.

\*\* Approval of a contract or other agreement will not be granted until the City receives a signed copy of this Certification.

\*\*\* Your social security number may be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended.

**CERTIFICATE OF FOREIGN CORPORATION (if applicable)**

The undersigned hereby certifies that it has been duly established, organized, or chartered as a corporation under the laws of:

---

**(Jurisdiction)**

The undersigned further certifies that it has complied with the requirements of M.G.L. c. 30, §39L and with the requirements of M.G.L. c. 181 relative to the registration and operation of foreign corporations within the Commonwealth of Massachusetts.

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**Name of person signing proposal**

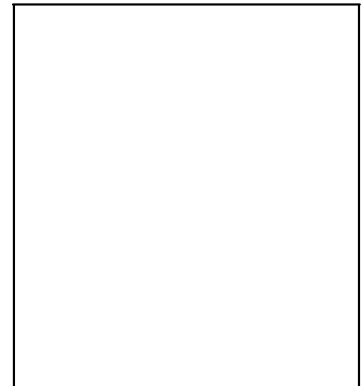
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**Signature of person signing proposal**

---

**Name of Business (Please Print or Type)**

*Affix Corporate Seal here*



## APPENDIX A

Street #	Street Name	Village	Assessors DB Date
9	Newell	Auburndale	1960
17-19	Newell	Auburndale	1915
21-23	Newell	Auburndale	1918
32	Newell	Auburndale	1915
36	Newell	Auburndale	1927
44-46	Newell	Auburndale	1935
48-50	Newell	Auburndale	1930
51	Newell	Auburndale	1880
54	Newell	Auburndale	1905
58	Newell	Auburndale	1929
61-63	Newell	Auburndale	1916
70-72	Newell	Auburndale	1920
79-81	Newell	Auburndale	1915
2	Orris	Auburndale	1880
6	Orris	Auburndale	1895
7	Orris	Auburndale	1900
14	Orris	Auburndale	1929
17	Orris	Auburndale	1865
20	Orris	Auburndale	1880
24	Orris	Auburndale	1910
27	Orris	Auburndale	1930
28	Orris	Auburndale	1920
32	Orris	Auburndale	1925
33	Orris	Auburndale	1914
7	Perry	Auburndale	1930
8	Perry	Auburndale	1919
11	Perry	Auburndale	1920
11	Washburn	Auburndale	1895
16	Washburn	Auburndale	1882
17	Washburn	Auburndale	1880
21	Washburn	Auburndale	1898
25	Washburn	Auburndale	1904
32	Washburn	Auburndale	1954
36	Washburn	Auburndale	1950
40	Washburn	Auburndale	1950
44-46	Washburn	Auburndale	1920
48-50	Washburn	Auburndale	1920
52-54	Washburn	Auburndale	1930
56-58	Washburn	Auburndale	1905
60	Washburn	Auburndale	1948
61	Washburn	Auburndale	1921
68	Washburn	Auburndale	1920
69	Washburn	Auburndale	1890
81	Washburn	Auburndale	1914
90	Washburn	Auburndale	1890
92	Washburn	Auburndale	1903